



Job posting

DEVELOPMENT ASSOCIATE, FT, Non-Exempt

This position is in-person

Surrey

60 Surrey Way

Devon, PA 19333

POSITION SUMMARY:

The Development Associate is primarily responsible for management of the Raiser's Edge database, entry and management of gifts, creation of reports and queries, assistance with special events, direct mail, volunteer activities, and the provision of clerical and administrative support for the Director of Development and others engaged in Development and donor relations activities.

SPECIFIC RESPONSIBILITIES:

Development Program: Provides clerical and general office support for the Development Office assisting in the successful implementation of Development programs including capital, program and endowment campaigns, major gifts programs, planned giving programs, annual giving campaigns, direct mail, foundation and grants development, events and activities, donor and prospect relations and miscellaneous philanthropic activities.

Database Management: Serves as the primary manager of the Raiser's Edge database, correctly coding, entering and allocating gifts to appropriate constituencies, funds, divisions, campaigns, and solicitation categories; prepares monthly Development report and other reports as requested; reconciles information with Finance on a monthly basis or more frequently as needed; and enters prospect, foundation, event, and other donor relations information as requested.

Gift Receipts: Enters all gifts and pledges into Raiser's Edge software; develops letters of gratitude, secures signatures, and ensures that all letters are correct and mailed within 48 hours of gift receipt.

Gift Reports: Using Raiser's Edge software extracts and prepares donor, gift and pledge reports including reports categorized by constituency, levels of giving, division,

campaign, event, fund restrictions, pledges and payments on pledges, and other report designations deemed necessary.

Donor Recognition: Using Raiser's Edge software maintains a master list of donors for recognition; creates and assures that recognition lists are accurate and up-to date; prepares donor lists for Website and annual reports; and manages all other forms of donor recognition.

Prospect Development: Using Raiser's Edge maintains accurate and up-to-date donor and prospect files; prepares forms and methods for monitoring donor, prospect, and solicitor activities; identifies major donor and planned giving prospects in database; research prospects and suggests cultivation strategies; assists with preparation for prospect cultivation/solicitation meetings; and participates in prospect development activities as needed.

Events: Provides assistance to the Director of Development and others involved in the planning and implementation of events as directed including the development of materials, coordination of schedules, management of arrangements; participates in meetings, creates reports, assists with activities before, during and after the event.

Direct Mail: Oversees direct mail processes working with volunteers and others to ensure accurate and timely mailing procedures; creates mailing lists segmented according to criteria; manages and monitors the mailing process; and establishes methods for response management.

Donor Stewardship: With Director of Development, supports various donor stewardship and donor appreciation activities such as lunches, meetings, preview activities for events, newsletters, and other types of personal communications; addresses donor inquiries in a professional, courteous, and effective manner; and tracks and records donor relationship activities on prospect and donor records.

Meeting Management: Schedules and coordinates various meetings as directed: makes arrangements, prepares materials, sends notices, makes calls as needed, prepares attendance lists and accurately writes and maintains records of minutes, agenda, supplementary and follow-up information and correspondence as appropriate.

Constituent Relations: Works with Board members, staff, volunteers, donors, prospects, consultants, advisors, and all others involved in Development activities in a professional and competent manner.

Ethics & Professional Standards: Maintains a professional demeanor in dress and behavior; treats all people with respect & dignity; maintains all donor and prospect information in the strictest confidence.

REQUIREMENTS

- Bachelor's degree, CRM training, or previous experience in relevant field.

- Proficiency at the Intermediate/Advanced level with Raiser's Edge software is required.
- Above average ability to extract meaningful data from Raiser's Edge.
- Expertise in Microsoft Office Suite, with emphasis on Word & Excel.
- Ability to understand and manipulate data for gift and donor analysis, list segmentation, and the preparation of various standard and customized Development and donor reports from Raiser's Edge.
- Ability to develop intuitive queries and analyze data to create reports that support planning, monitoring and decision-making activities from Raiser's Edge.
- Innate ability to identify prospects based on giving patterns including giving trends, interests and linkages to Surrey Mission, programs, and people.
- Demonstrated understanding of donor-centric fundraising.
- Ability to assist with volunteer projects and training to assure excellent outcomes and satisfying experiences.
- Critical-thinking skills, problem-solver, takes initiative; works well in a team and independently.
- Outstanding written and oral communication skills.
- Organized, detailed-oriented individual with emphasis on accuracy; able to work efficiently and meet deadlines.
- Excellent clerical and office operations skills.

BENEFITS

- Health insurance
- Paid time off
- Dental insurance
- 401(k)
- Vision insurance
- Life insurance
- 401(k) matching
- Health savings account
- An Equal Opportunity Employer

Surrey is an Equal Opportunity Employer. Qualified applicants will not be discriminated against on the basis of race, religion, gender and gender identity, nationality and origin, disability, sexual orientation, age, and veteran status.

COVID-19 precautions

Surrey is following all CDC guidelines relative to COVID-19.

APPLYING

Resume and cover letter required. Email both to [Kathy Tougher, MBA](#).